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ABSTRACT

A staff-needs planning system was developed and tested in a Department of Social Services' Family and Children's Services Unit in a medium-sized county where caseworkers used no established strategy or planning method to facilitate accomplishment of all the job requirements. The goal of the study was to implement a planning system based on each caseworker's needs in order to increase his/her organization and the quality of services provided to his/her clients, and to reduce overtime. The results indicated improved handling of caseworker's responsibilities. However, the improvement could be related only indirectly to the planning system. Appendices include sample question and survey forms, planning system forms, implementation plans, and percentage scores. (MSF)

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Using a Staff Needs Planning System to Increase Organization, to Increase Quality of Client Services, and to Reduce Overtime.

by

David Stang

Cohort 56

A Practicum Report Presented to the
Master's Program for Child and Youth Care Administrators
in Partial Fulfillment of the Requirements
for the degree of Masters of Science

NOVA UNIVERSITY
1993

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Abstract

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The scene took place in a Department of Social Services' Family and Children's Services Unit in a medium-sized rural county. There was no established strategy or planning method used for accomplishing all the job requirements. To accomplish all that was required, a staff-needs planning system was developed.

The goal was to implement a planning system, based on each caseworker's needs, to increase her/his organization, increase the quality of services provided to her/his clients and reduce overtime. The solution strategy was to provide the staff with a planning system based on each caseworker's needs.

The results indicated improvement of the caseworker responsibilities. However, the improvement could only be indirectly related to the implemented planning system. The supervisor intends to use the planning system as part of the training program for new caseworkers. Appendices include sample question and survey forms, planning system forms, implementation plans, and percentage scores.

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Chapter I

The Scene

The scene took place in a Department of Social Services' Family and Children's Services Unit. The department serviced a medium sized rural county of about 22,000 people. The unit conducted initial intake screening and ongoing services for children from birth to 18 years old. It had three program areas: 1) Delinquents and Parent-Child Conflicts, 2) Protective Services (includes physical or sexual abuse, and neglect {medical, educational, children with severe disabilities}), 3) Permanency Placement, Subsidized Adoptions, and Special Needs Children. The unit was composed of 6 persons filling 4 full time employment (FTE) positions and 2 half-time FTE positions. Two of the caseworkers performed intake services and opened new cases. The other four caseworkers worked with the ongoing cases. The unit serviced all qualified persons, regardless of economic, racial, or gender status.

The intake workers' responsibilities were to receive all new referrals from the community. These calls came from law enforcement, the medical professions, the educational professions, the mental health professions, families, relatives or concerned citizens. The intake workers screened incoming referrals based on a services criteria format. Those referrals, which initially qualified, were investigated for further need of services. Those situations which could be resolved within thirty days were assigned to the intake workers. Those cases which were more complex and required extensive services were referred to the ongoing workers. The caseloads of these two persons was 40 and 49 cases.

The ongoing workers' caseloads were comprised essentially of the three primary program areas as previously described. Services were normally provided for children and youth who, for a variety of reasons, had been removed from their homes. The caseworkers provided services primarily through placements in the community or various placements throughout the state. The placement of

clients depended upon meeting a specific established criteria, their needs, and the level of restrictiveness required to reunite the family. From the least restrictive to the most restrictive, these placements ranged from the homes of a relative to foster homes, group homes, child placement agencies, and residential child care facilities. The duration of a case ranged from a few months to a maximum of 21 years. These caseworkers were responsible for designing and implementing treatment plans which resulted in the reunification of the family as quickly as it was therapeutically possible. They were also accountable to the family, multiple attorneys, the court, probation, the county, the department of social services, their fellow workers, the State of Colorado, the placement staff, the community, law enforcement, and themselves. The average number of cases for these caseworkers was 17.

The work environment was divided into two areas, separated by a public hallway. Each area was a large room in which several desks were placed for the caseworkers. There were no separation barriers between the desks. There were multiple disruptions from telephones ringing, conversations between persons, and a building-wide intercom system. There were, however, separate offices for one administrator and two supervisors. Interviews were conducted in one of the separate offices, a small room down the public hallway, or in a house across the street. Other factors of the environment concerned the absences of other caseworkers through various reasons including illnesses, vacations, or attending educational inservices. Because of the nature of the business, there were several external factors influencing the caseworkers. These included client emergencies, new regulations from the state department, other inquiring calls from the community, special projects from the administration, the supervisor, the community, or the state.

The hierarchy of the Family and Children's Services Unit consisted of the director of the department, an administrator, who was also responsible for an Adult Services Unit located on the floor below the unit, and one supervisor. There could also be one or two community services workers supervised by the administrator or supervisor.

About the Author

I received a Bachelor of Arts Degree From the University of Colorado in Psychology in December of 1980. My first professional position in the child-care field was that of a floor counselor in a short-term shelter home for adolescents from 12 to 18 years of age. After two years, I was promoted to senior counselor.

After having worked for this agency 3.5 years, I was hired by a social services department as a Social Caseworker II. My responsibilities were: intake and ongoing services for youth between the ages of 12 and 18, but I provided services for youth and families of any age on my caseload. After one year, I was promoted to a Social Caseworker III. This meant having the same responsibilities, but for more severe cases and with less supervision. During my third year at the department, I was assigned the additional responsibility of supervising a group home licensed by the department. This home had a capacity of 8 adolescent males. It was staffed by 3 FTE persons.

After working for this department 6.5 years, I became the director of the local county shelter home. This home had a capacity of 12 male or female adolescents. I began supervising 6.5 FTE staff which grew to 7 FTE and 2 half-time FTE. My responsibilities included all aspects of managing a facility: supervision of staff, supervision of the residents, scheduling of staff, evaluating staff, program development, program maintenance, building maintenance, budget planning, budget implementation, etc. During this employment, I began my Master of Science degree in Child and Youth Care Administration through Nova University of Florida. After three years in this position, I found employment in my current position as a Social Service Supervisor III.

The responsibilities of the supervisor III position are: 1) Supervising: Provide direct supervision to a staff of professional social caseworkers who provide a full range of social welfare services and programs; 2) Planning: Oversee staff assignments and scheduling; conduct individual and

group conferences to set and monitor deadlines; establish goals and time tables usually ranging from 30 days to one year; meet with administration as needed to participate in program planning; 3) Organizing: Organize the work within the unit to assure coverage and efficiency in case-load handling based on the available knowledge and skills of the assigned workers; develop systematic methods of implementing programs which include developing controls and monitoring work flow; 4) Budgeting: Determine the resources required to achieve the goals of the unit and make recommendations to higher level management, which sets priorities and develops budget; 5) Directing: Assign specific tasks, usually work on hand, to immediate subordinates and lead-workers; provide guidance and consultation in the accomplishment of day-to-day tasks assigned to caseworkers; 6) Instructing: Give written and verbal instructions to subordinates on issues; meet with workers individually and in groups to explain rules, policies, procedures, and laws; work with staff on an individual case basis reviewing actions taken, counseling on effective resolution of problems in cases which are difficult for the worker, and creating work situations which allow professional growth; 7) Setting standards: Set professional standards primarily through state rules, statutes, and manual regulations; establish unit rules for work performance on the job; establish work load and quantitative standards for the unit; 8) Reviewing: Monitor the work of immediate subordinates and review the work of the total unit's effectiveness with regard to plans and programs, through individual conferences, the case plans, the treatment plan, and the placement plan; reviews occur before, during, and after the performance task; 9) Training needs: Needs are established in an individual and unit basis; staff development, state department staff, and outside facilitators are resources; assures an effective training program is in place, which includes an assessment of need and the evaluation of training received; 10) Counseling and Discipline: Resolve problems and complaints involving the unit; participate in resolving grievances and making recommendations for disciplinary actions to be taken against staff; 11) Appraising Performance: Review the performance of workers

on a periodic basis and complete the annual performance rating using the appropriate forms; establish individual performance plans and objectives and evaluates based on the achievement of past plans and objectives; and 12) Performing other personnel functions: Take responsibility for making hiring and termination recommendations to administration for the unit.

Chapter 2

The Problem

There were no established strategy or planning methods used by the caseworkers in this unit for accomplishing all the job requirements. To accomplish all that was required for proper casework procedures, an organizing and planning tool needed to be developed. The tool needed enough flexibility to meet the different requirements and characteristics of each caseworker. For example: within the unit, there were several different job classifications. As described in chapter one, two caseworkers had responsibilities specifically for screening incoming referrals. One caseworker's sole responsibility was the management of those cases which required services beyond the intake process. One caseworker, who worked part-time, did case management, supervised a group home, and was licensing a new group home. One caseworker, also part-time, did case management and licensed and supervised all county foster homes. The last caseworker, a full-time employee, only worked part time for this unit. She also did case management of on-going cases.

The developed tool needed to address several issues which were pertinent to each caseworker's responsibilities. The primary targets were: completion of required paperwork in a timely manner, to provide quality services to clients, case planning, court planning, traveling to required appointments, attendance at mandatory meetings, crisis intervention, working with unscheduled events, and the assignment of new cases. The tool needed to define a clear description of the work requirements. Its purpose was to prevent excess work, provide clear

guidelines of work responsibilities, and to develop a standard of priorities. Lastly, the tool needed to be developed for the planning of daily, weekly, and monthly activities.

Documentation

A survey was submitted to each participant of the project (see Appendix A). The purpose of the survey was to learn whether the caseworkers used a daily planner, the average amount of overtime each caseworker worked, whether they had control over their work performance, and whether they practiced goal setting and completion routines. The results of the survey (two persons did not participate stating they were too busy) indicated that three of the four caseworkers used a daily planner. From direct observation of those planners, the items planned by the caseworkers were primarily for meetings (court, clients, and agency).

The survey indicated that the caseworkers were performing an average of 3.9 to 4.9 hours of overtime per week. They were working 5.3 hours of overtime per month during their days off. Question four (With your current caseload, are your current responsibilities behind, on target, or ahead of your expectations?) indicated two caseworkers were behind with their current caseload expectations, one on target, and one ahead of those expectations. Question five (How much control do you believe you have over your ability to perform your job?) showed the caseworkers believed they had 47.5 percent control over their ability to perform their jobs. For this question, one worker wrote "very little". Concerning the portion of their job for which they did not have control, the caseworkers attributed 46.7 percent to the client's needs, 53.8 percent to the department's needs, and 15 percent to the needs of other agencies. Question seven (Do you practice a goal-setting and completion routine?) indicated that three of the caseworkers practiced a goal setting and completion routine. To this question, one worker replied s/he had used this practice "until [I] became overwhelmed".

Analysis of the May, 1993, time sheets showed that each caseworker worked an average of 8.5 hours per month or 2 hours per week of overtime. However, these time sheets were not entirely accurate because there was no incentive to report overtime and little compensation for it.

Analysis

The caseworkers had expressed being overwhelmed by the amount of work they needed to perform and complete their job responsibilities. At that time, the caseworkers had not established a specific daily time for case planning. As a result, there was no plan to accomplish their daily, weekly or monthly requirements. The survey supported these statements by demonstrating that the average amount of overtime worked by the caseworkers during the work week was 3.9 to 4.9 hours. During the month, they worked an average of 5.3 hours on their days off. It was not uncommon for a worker to come to the supervisor and make statements such as "I don't know how I can get it all done" or "I will just have to come in this weekend to catch up with my paper work." These overtime hours are commonly on a voluntary basis. Because of this sense of being overwhelmed, the caseworkers may not be motivated to increase their workload by adding a planning period to their already busy schedules. As a result, motivation could become a strong issue with respect to requesting the caseworkers to try out a new system of planning and organization.

Further evidence that the caseworkers were out of control of their job responsibilities was collected from the survey. The most significant statistic revealed that the casework staff believed they had only 47.5 percent control over their ability to perform their jobs. To apply the reverse, the caseworkers believed they had no control of 52.5 percent of their jobs. This was an alarming amount of no control. Concerning that 52.5 percent (of no control), the workers reported the largest portion of their job for which they had no control (52.5 percent) was due to the department's needs, with the client's needs at a close second (46.7 percent). In addition, two of the six workers

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stated they were behind on their current caseload responsibilities. The alarming amount of non-control from the workers indicated a need to regain that control.

The next piece of information from the survey indicated that a majority of the workers did keep daily planners. Upon inspection of those planners, this author observed the primary items scheduled were client appointments and court hearings. There were no plans for completing paper work or other job responsibilities. Three of the caseworkers stated they did keep a goal-setting and routine-completion schedule. However, these goals were not listed in their daily planners.

To enable the workers to consider using a new method for completing their casework responsibilities, they would have to perceive its capability to help diminish the concerns stated above. Ellis (1988) pointed out the importance of employees having autonomy and personal choice in performing their job responsibilities toward the development of their positive attitudes and behaviors. To accomplish this, Ellis promoted two ingredients employees could use to realize their creative achievements. They were: 1) An increased accountability of the employee for her/his own work, and 2) Additional freedom and authority granted to employees to carry out their jobs. It was this author's intention to enhance the caseworker's positive attitudes and behaviors by developing a planning system which utilized these ingredients. The planning system was designed to allow the caseworkers to establish control and practice their own authority over their work requirements by scheduling them. It would also increase their sense of accountability when they observed their accomplishments through their plans.

Savickas (1990) contributed to the concept of planning as a means to prevent anxiety. He stated that a person whose orientation was to the future could create a situation of anxiety. The solution for the anxiety was to create a differentiated future. This reduced anxiety through imagining one's own place in time. It was accomplished by naming the anticipated events, and enabling the planner to adapt to the future. These names or labels for future

events were generated from experienced events. They reduced the unknown, and therefore reduced anxiety. Savickas stipulated that anxiety was greatest when a person knew something was going to happen, but s/he had no idea what would happen. Naming the event turned anxiety into controlled thought, and therefore into anticipation. It allowed for discussion and enabled the individual to be prepared for the event. The proposed planning system was designed to enable the caseworkers to reduce their anxiety by naming future events. By naming those events, they would be able to turn their anxiety into controlled thought and anticipation.

Another suggestion by Savickas (1990) was the use of occupational daydreams through techniques like guided imagery of the future. These daydreams were used for examining, developing and enhancing goals. They could be used as a tool to shape goals into more achievable, believable, and concrete forms. He then discussed the concept of temporal integration, a sense of connectedness among events across time zones of the past, present and the future. This connectedness generated optimism about the achievability of goals. It enabled the planner to develop a cognitive schema for realistic planning through the integration of time frames. The integration provided hope that goals could be achieved through the interconnectedness of shaping the future by acting in the present to implement the goals (p13). To accomplish this, the caseworkers would be encouraged to imagine all of the different steps required to accomplish each goal. The planning system was designed to take advantage of this process. Three specific sections of the planning system were designed for listing the caseworker's goals. These sections were: "Today's Goals, Must Do, and Need To Do. From these goals, the caseworkers imagined each concrete and achievable step required to accomplish them. They would then schedule them into the daily portion of the planning system.

Another aspect to alleviate the caseworkers from believing they had no control over their jobs concerned task identity and task significance (Charters & Others 1984). This was a process of prioritizing tasks. Through this process, the caseworker exercised autonomy in selecting the order of performing

the work. It resulted with feedback to the caseworker concerning her/his effects of her/his efforts to make progress toward completion of the job responsibilities. To accomplish this, a component added to the planning system was a coding key. The key was designed to designate the priority of each goal, indicate whether the goal was to be held or delayed, and to indicate that the task was done. The caseworkers would exercise autonomy through prioritizing each goal and gain immediate feed back by observing those tasks which were completed.

Katzell & Thompson (1990) defined work motivation as "a broad construct pertaining to the conditions and processes that account for the arousal, direction, magnitude, and maintenance of effort in a person's job" (p144). They discussed several work motivation theories which were applicable to this paper. The first was labeled the "Personal and material resource" theory (p145). The theory stated that conditions facilitating goal attainment were positively motivating. Implementing a planning process which facilitated goal attainment would therefore increase caseworker motivation.

The next theory discussed by Katzell & Thompson (1990) was called "Group and norm theory" (p145). Here, people were motivated to perform well when their work group facilitated and approved of it. The dynamics of work groups often established norms of cohesiveness, work behavior, and conformity to the group norms. In this casework unit, where it was believed that 52.5 percent of their ability to perform their job responsibilities were not under their control, the norm of having no control may have been established. Using a planning method to gain that control may help to change the norm and generate group support rather than group helplessness.

"Intention/goal" theory (Katzell & Thompson 1990 p145) related a person's performance by the goals to which s/he was committed. The theory stated that people who were committed to specific hard goals performed at higher levels than people who have easier or vaguer goals. The intended planning system for this paper was designed to enable the worker to clarify each goal (difficult or easy) through naming the goal and then planning for each necessary step to

complete the goal.

The "Attribution/self-efficacy" theory (Katzell & Thompson 1990 p146) related successful performance and self-efficacy beliefs to a worker's perceptions of her/his performance being stable, internal and intentional. People who possessed a good self-efficacy and self-esteem were likely to have had high performance standards and goals, high expectations of performance, favorable job attitudes, and a willingness to put forth effort on challenging tasks. The planning system was designed to provide immediate feedback to the caseworkers. It was anticipated that the feedback would enhance the caseworkers' perceptions of their performance and increase their performance.

Finally, Katzell & Thompson's (1990) discussed the importance of developing goals which were specific, clear, attractive, and difficult but attainable. It was important that the employee was committed to the goals, a condition that was fostered by ensuring that the goals were acceptable. Incorporation of this concept into the planning system was previously discussed.

Chapter 3

Goals and Objectives

The goal of the practicum was to implement a planning system based on the caseworkers' needs; increasing their organization, the quality of services provided to their clients, and reducing their overtime.

The objectives to be accomplished during the twelve-week implementation period were:

1. To present the practicum to the caseworkers during the first two weeks and to create ownership and a desire to participate.
2. To establish each caseworker's planning strategy by the end of the second week.

Attainment of these objectives was measured by the mutual agreement

between each caseworker and the author that a planning strategy had been established. Fulfillment of the goal was also measured by the cooperation and motivation of the caseworkers to work with a new planning method.

3. To increase the caseworker's organization 100 percent using her/his planning strategy by the end of the twelfth week.

Attainment was measured through the completion of required paperwork in a timely manner. For example, all court reports were to be submitted to the court 20 days before the hearing date.

4. To increase the quality of client services from the caseworkers 100 percent by the end of the twelfth week.

Attainment was measured through the evaluation of a questionnaire designed to compare the percentages of time spent by each caseworker for each specific task. The tasks were be rated, based on her/his opinion, on the actual percentage of time spent for each task, on the idealistic percentages of time spent for each task, and on the realistic percentages of time spent for each task. This was given to the caseworkers before the exercise, after the seventh week, and after the twelfth week of the exercise. Measurement consisted of the differences between the initial, half-way, and completion responses. What was measured was the percentage changes which occurred in the responses to the questionnaire over the process of the study (see Appendix B).

5. To reduce staff overtime by 100 percent by the end of the twelfth week.

Attainment was measured through the evaluation of actual time-sheet forms and a questionnaire designed to solicit the opinions of the caseworkers before implementation and after the exercise.

6. To increase the caseworkers' concepts of their ability to perform their jobs by 50 percent by the end of the twelfth week.

Attainment was measured through a questionnaire designed to solicit the opinions of the caseworkers before and after the exercise. The differences between the responses were used to determine whether the

staff believed the exercise was successful. It may be possible for an exercise to be successful with its intent but unsuccessful in the eyes of the subjects. This questionnaire was designed to determine whether the subjects believed the exercise was successful (see Appendix A).

Finally, the administrator of the social services unit was asked her opinion of the exercise. She was not a participant in the exercise and therefore could present another objective opinion about the merits of the exercise. Perhaps, at this point, this person could be provided with both questionnaires to limit the discussion to its applications.

Existing Programs, Models, and Approaches.

There was some literature available which supported different aspects of this practicum. First, discussed was the literature relevant to the presentation of the practicum to the caseworkers toward creating ownership and a desire to participate. As a result of this motivation and ownership (and about the planning process, discussed later), it was anticipated the fourth objective of increasing client services 100 percent was possible.

The caseworkers stated they did not have enough time to complete their required responsibilities. Savickas (1990) discussed how people viewed time about successful planning. People viewed time as an ally, an enemy, a harasser, or an irrelevancy. Their perspectives made time seem ascending, fast, slow, running out, and so on. Those individuals with high achievement and motivation possessed a distinctive attitude toward time. This was observed through their preference for time metaphors involving precipitant haste. Savickas discussed the advantage of planning through a differentiated future, a method for viewing the future based on an individual's current situation. A differentiated future provided a meaningful context for setting personal goals. Individuals who only planned with the future in mind may have created anxiety for themselves. Future differentiation alleviated this anxiety by allowing individuals to envision the future and their place in it.

Savickas (1990) then addressed how naming or labeling the anticipated event helped to reduce anxiety. Labeling the event provided the person with a means to think about, discuss, anticipate and prepare for the event. In this way, plans could bridge the gap between knowledge and action. One suggestion for accomplishing this was to have the caseworkers compare and contrast their currently-experienced situation to their currently-desired situation. Then, based on the differences between the two, they could devise a plan to move toward where they would like to be. This strategy could resolve the problem identified by Aguila (1988) where the fear of failure prevented persons from getting started on projects.

Keller (1990) discussed motivation from the perspective of affect. The nature of the affect determined the magnitude which the student would put forth to learn a specific task. The meaningful success of an experience was dependent upon the quality of the experience. This involved the collaboration between educator and student to make the educational experiences cognitively and effectively meaningful. Keller pointed out two important aspects for providing a positive affect: an immediate aspect of agreeableness through experiences that ensured participation, and feedback that would encourage a positive approach to later experiences. Keller then presented a suggestion of learning using the elements of play to provide meaningful experiences in the learning process. Play was enjoyable, intrinsically motivating, and involved activity.

Ellis (1988) discussed motivation from the perspective of autonomy. Those workers who perceived they had autonomy and personal choice in carrying out their job responsibilities were more likely to develop positive attitudes and behaviors toward their jobs. Ellis then identified three psychological states which lead to beneficial outcomes. For each state, she also identified a need. The first state concerned skill variety, task identity, and task significance. The corresponding needs for this state were identified as increased accountability of the employees for their own work.

The second state pertained to autonomy which directed responsibility. Its corresponding need was additional freedom and authority granted to

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employees to carry out their jobs. The third state involved feedback. Its corresponding need was also identified as feedback. The results were knowledge of performance and job results.

Ellis identified a final need where the employee required an introduction of new and more challenging tasks. The planning system for this project was developed to compensate for those factors.

Charters & Others (1984) singled out five properties of jobs. Those "core job characteristics" represented a job's motivating potential. They were identified as skill variety, task identity, task significance, autonomy, and feedback from the job. These characteristics were related to the three psychological states mentioned above and were regarded as central conditions of strong internal work motivation and positive work outcomes. These core characteristics would place meaning into a job for an employee where the job required a variety of skills, involved the completion of a whole and identifiable piece of work, and had significance for the lives of other people. They would foster individual ownership to the degree that it provided the employee with autonomy in selecting the methods for carrying out the work.

Aquila (1988) pointed out the use of a varied time schedule to minimize potential boredom. The ability to develop a varied time schedule was built into the planning system, allowing further autonomy for the employees. Finally, Charters et al. (1984) stated that feedback would furnish the employees with information on which to judge the effects of their efforts.

Next were the concepts of planning. It was anticipated that as a result of efficient planning, the casework staff would reduce their overtime work completely. About planning, Abdel-Halim (1981) discussed how role conflict and ambiguity became presenting obstacles which blocked goal attainment on the job. Savickas (1990) prescribed a resolution to prevent this occurrence through densely populating a time zone with events. He reported the more events populating a time zone, the more that time zone seemed real to an individual. This enhanced his concept of naming anticipated events so they could be thought about, discussed, anticipated, and prepared for.

The Manual for training supervisors (1980) provided a planning strategy where the planner began by developing a set of task statements depicting the job to be accomplished. Each task statement was a generalized description of related activities used to accomplish a specific objective. When this had been completed, each task's importance was prioritized. Then starting with the most important task, the worker determined what was necessary to perform that task and went about completing it. Each task was then handled in descending order of importance. This method satisfied Ellis's (1988) psychological state for task identity. Burton (1984) discussed a similar method of breaking large projects into smaller step-by-step tasks using outlines and then crossing off the completed tasks from the lists. This method provided feedback to the worker through a visual show of accomplishment.

The Long-range plan, 1978-83 (1978) provided an eight-step procedure for a long-range planning cycle. Those steps relevant to casework planning were included here. The first step pertained to reviewing the planning objectives and determining a preliminary priority assignment for each objective. This included establishing an appropriate time frame for each objective.

The next step was to conduct an evaluation of the extent and quality by which the objective could be achieved. The third step involved developing flexibility into the planning process to allow for new situations and clienteles. This allowed for new input or updating existing information. The fourth step involved developing a time frame for accomplishing each task or activity of the objective. Each task was prioritized, and plans were made for needed resources for completing the task. The fifth step involved supervisory review of the worker's plan. The supervisor provided feedback about the relative priority of each objective, recommendations for present and future use, and revising or updating the objective.

Smith & McDonough (1965) discussed creating a plan by developing a schedule which was made from the primary responsibilities of the worker. These were then defined as major blocks. Within each block, the worker scheduled the required responsibilities to be accomplished during that time block. The

resulting schedule was then posted so other coworkers could respect the individual's schedule. This method allowed for less interruptions during the work day. It also allowed other coworkers to inform walk-in clients when a caseworker could meet with them without having to interrupt her/him.

Solution Strategy

The solution strategy was to provide the staff with a planning system based on each caseworker's needs. To accomplish this, the caseworkers would be motivated by being able to develop ownership in their own planning system. Two forms were provided to the caseworkers for organizing their planning system (see appendix C and D). The first form allowed each caseworker to create a general plan for display. Its purpose was to provide information to the other caseworkers about their daily activities. It also provided information which allowed other caseworkers to respect each other's planned time and provided appointment information for walk-in clients.

The second form allowed for a multitude of functions. They included listing daily goals, planning appointments, planning priorities, listing responsibilities for the day, keeping track of tasks, and planning future events. It contained a key for prioritizing tasks, putting tasks on hold, delaying tasks for another time, and providing feedback about how many tasks were completed during the day.

The second form was used to plan for the future during the present, and for putting labels on all necessary tasks. This produced future differentiation. It allowed the caseworkers to envision the future and their place it. It enabled the caseworkers to exercise autonomy in determining their future, prioritizing task completion, and adjusting the plan to meet their needs. It allowed for skill variety, task identity, and determining task significance. The abilities to do so would meet the workers needs for accountability of their own work, defining their own meaningfulness in the job, freedom and authority to carry out their jobs, and feedback of performance and

job results.

During the first two weeks of the project, the caseworkers were introduced to the practicum as well as the schedules and how to use them. The author met individually with the caseworkers to further develop their use of the planning tools with respect to their own needs. Continuation of the use of the planning system required the resource of time. It was anticipated that this would initially be a scarce resource. However, as the caseworkers adjusted to the benefits of the planning system, it was anticipated they would actually have time for planning and find more time for improving client services. Permission had been obtained by the supervising administrator to pursue this project.

During the remaining ten weeks of the project, the author met with the caseworkers to provide guidance, feedback, and support for completing their job responsibilities. The project was evaluated, through the use of the evaluation tool in appendix B, before the initiation of the project, at the end of the seventh week, and after the completion of the project. It was anticipated that this planning method would become instituted into the job requirements of the caseworkers.

Report of the Action Taken

The first event was the distribution of two evaluation tools to the caseworkers (Appendix A and B) before the introduction of the practicum.

During the first two weeks of the project, the staff was introduced to the planning system during a regular staff meeting. Due to unavoidable circumstances, only three of the workers participated in this meeting. One of them had to leave early. Also during the presentation, the author received an urgent telephone call concerning the immediate need of surgery for a client.

The advantages of the planning system (staff were allowed to provide input for their own planning techniques to meet their specific needs) and instructions for its use (the author incorporated relevant work theories to

enhance the planning process) were discussed to create ownership and the desire to participate. Specific topics discussed were: better organization, meeting departmental job requirements, increased quality of services to clients, and decreased overtime. Motivation techniques previously mentioned were presented. For example, Keller's (1990) suggestion of play therapy (involves activity) was incorporated by providing schedules (appendix C and D) for the caseworkers to manipulate during the discussion. Another activity used was brainstorming (Kerwin 1983). This technique enabled the caseworkers to consider the planning system from a positive aspect. At the conclusion of the meeting, the caseworkers were instructed to complete the two schedules and bring them to their individual supervisory meetings.

After the initial staff meeting, and during the same two- week period, the author met with each caseworker during her/his individual supervisory meeting to answer any questions and assist them with the implementation of the planning system. Those caseworkers who missed the staff meeting were also introduced to the practicum in the same manner as described above. A notebook containing a two-month supply of scheduling forms and a separate section containing alphabetic separators was given to each caseworker. The purpose of the notebook was to provide a convenient place to keep the planning schedule, and a convenient way to carry the planning schedule with the caseworker to all activities. The "General Work Schedule" (appendix C) forms were completed and posted by the caseworkers in obvious locations near their desks. The caseworkers responded to the scheduling plan favorably. Some of them had hesitations (this was anticipated and planned to be worked out during the next phase of the practicum). They were able to repeat the purpose of the scheduling plan and identify several alternative, positive uses for the system.

During the next five weeks, the author met with each caseworker individually during her/his weekly supervisory meeting. The emphasis was to enable the caseworkers to increase their organization skills while learning how to use the planning system to their benefit. The author discussed with each caseworker: 1) How to establish a daily 30-minute planning time for planning

daily, weekly and monthly events; 2) How to develop plans that included required priorities as established by job descriptions and by their own needs; 3) How to catch up with any work which was behind; 4) How to plan for unexpected interruptions or events; 5) How to design a planning approach for prioritizing events; 6) How to develop a method for keeping the developed plans on target; and 7) How to use the planning system to keep track of progress and setbacks.

At the end of the five weeks (the seventh week) the evaluation tool (from appendix B) was re-administered to the caseworkers (for results see appendix F and G). At this stage, all of the caseworkers had begun to use the planning system to some extent. Primary obstacles reported by the caseworkers were: 1) They did not have enough time during their work hours to do the planning. Many workers had begun to use the planning system, but had not incorporated it to be all inclusive. 2) A few caseworkers were having difficulty adjusting from their previous planning systems to the new system. One person already had a good planning system. She was committed to the project, but needed time to convert her scheduling from her existing system to the proposed planning system. 3) There was some delay from a few caseworkers to start the scheduling plan. However, these individuals continued to express support and an intent to use the planning system. 4) On the issue of overtime, one caseworker stated she was so used to the idea of working overtime that she considered it to be part of her normal working hours. She stated that for her, it probably would cause more problems to limit the overtime than to work the hours. She stated that she did have a concept of when the amount of overtime would be too much for her. At that point, she reorganized her schedule to adjust her work time to remain within her standard of limits. 5) During this period, the district court judge expressed his dissatisfaction with the reports being presented to him. He had two major concerns: The subject of "reasonable efforts" was not adequately being presented, and the reports to the court were being presented late. Both of theses important issues caused some consternation for the casework staff. Solutions to resolve the problem were to conduct inservice training on

"reasonable efforts", for the supervisor to continue reviewing the reports before they were submitted to the court, and to develop a tickler system indicating when court reports were due. It was anticipated by the author that the tickler system would be further enhanced by the caseworkers through developing a schedule for completing the court reports in their planning schedules. Some caseworkers did, some did not. 6) Also, during this time, the court ordered a caseworker to conduct four supervised visits per week for one of the families on her caseload. This was a part-time worker. As a result, the supervised visits ended up taking the time of several workers.

Advantages reported by the caseworkers were: 1) One caseworker reported that she was no longer double booking herself. 2) Another caseworker reported she did her planning one week at a time, and was able to use her previously established "General Schedule" form to speed up the process. 3) Another caseworker expressed she liked the ability to make lists and move them if they did not get done.

The solution to the scheduling problem included allowing the caseworkers to adapt their planning systems to meet their specific needs as based on the various job descriptions. Therefore, suggestions for alternative methods of using the planning schedule were solicited. Suggestions presented by the caseworkers at this point were: 1) The date block could be different. Rather than the current set up of:

Month_____ Day_____

Date_____ Year_____

She proposed the set up could be:

Month_____ Date_____

Day_____ Year_____

The change was suggested so the above information would be presented in a fashion more common to her habits. 2) To create a way to include the logging of mileage. Solutions discussed were to keep track of the mileage by entering the mileage in the "Contact/Return" column of the daily planning form. Another suggestion was to put the actual mileage form in the front pocket of the

notebook.

During the remaining five weeks, the author discussed with the caseworkers many of the items discussed during the previous five weeks. Also discussed were: 1) How to increase the quality of services to clients based on their individual planning system, individual progress and setbacks. 2) How to plan for all events during their work hours. 3) How to make up for those situations which interrupted their established schedule. And 4), how to establish some empty time during the day or week to be used for make-up work unfinished due to unscheduled interruptions.

Primary obstacles during this period were: 1) The caseworkers still showed interest in using the system. They were all using it to some point. Some were not using it to the extent of its possibilities. Reasons for not doing so were that they were still experiencing being behind with their work-load and could not take the time to fully implement the planning system. In these cases, the caseworkers stated they were still interested in the planning system, that they could adapt it to their uses, but needed to get caught up first. 2) One caseworker had difficulty with the physical size of the planning system. 3) One caseworker, who was a part-time worker, shared that the work place was kind of crazy. When she arrived at the office, she was already behind from things that had happened while she was away. She believed the job required acting rather than planning. The only time she had to think was when she was driving to and from appointments. 4) The court ordered one of the caseworkers to do supervised visits on Sundays. This was another part-time worker. If she were to compensate for this, she would have to work less during the work week. 5) One of the part-time caseworkers was relocated to a full-time position in another unit on October 1, 1993. As a result, her existing caseload needed to be summarized and transferred to the other three ongoing workers who already had full caseloads. This worker agreed to finish her participation in the practicum. 6) A new program instituted from the state level titled "IV A" began. The program, designed to generate new federal monies, required the completion of a new form. Only one copy of the form was provided by the state

with a commitment to generate a large supply printed on NCR paper in the near future. The form needed to be completed in triplicate. The new forms never arrived. This new program increased the work load of these intake workers. They either had to fill out the form three times for each case, or fill out one form for each case and have it copied.

The advantages recognized by the caseworkers were: 1) One caseworker expressed that she was having troubles keeping all of her job tasks within her scheduled time. However, she could use the planning schedule to be less flexible about her time during the month of October. 2) The size of the planning schedule was nice (the schedule was printed on a standard 8.5 by 11 inch page with each page containing only one day's events). The size made it easier for her to write more than one entry into a time slot, or adjust entries in a time slot when her schedule changed. This caseworker had large handwriting.

The following adaptations were suggested: The size of the planning scheduler was too large (it was placed in a standard sized three ring notebook). If it could be condensed, it would be easier to carry it in a purse. This caseworker has small handwriting.

After the last week was completed, the evaluation tools (appendix A and B) were again distributed to the caseworkers to determine the effects (positive and negative) of the planning system. The author discussed with each staff person the results of the planning process. The author discussed with his administrator whether there was a difference with the staff performance.

Chapter 4

Results

The goal of the practicum was to implement a planning system based on each caseworker's needs, increasing her/his organization, the quality of services provided to her/his clients, and reducing her/his overtime.

The first objective was to introduce the planning system to the caseworkers during the first two weeks, and to create ownership and a desire to participate. All of the caseworkers were introduced to the planning system during the first two weeks. The mechanics of the planning system were discussed with each caseworker enabling them to manipulate the planning system to meet their own needs. Each caseworker stated s/he was interested in the project and would participate.

The second objective was to establish each caseworker's planning strategy by the end of the second week. While planning strategies were discussed and established with each caseworker, and each worker stated s/he was very interested and willing to cooperate with the project, there were a few who never fully implemented the system as anticipated.

The third objective was to increase the caseworker's organization 100 percent using her/his planning strategy by the end of the twelfth week. Attainment was measured through the completion of required paperwork in a timely manner. During this period, the completion of required paperwork improved. It was not possible to determine at what percentage the improvement occurred.

One indication of paperwork improvement was through a system of ticklers provided to the workers by the state department. These ticklers indicated paperwork needing to be done by a specified time, and work that was overdue. At the beginning of the practicum, these ticklers were rather lengthy for some of the workers. One worker's tickler was three to four pages in length. This same worker's tickler at the end of the practicum was only three-fourths of a page long, a 75 percent improvement.

Another indicator for timeliness of paperwork was through the submission of court reports. The court required all reports to be submitted 20 days prior to a hearing. At the beginning of the practicum, reports were being submitted to the court within the week of the hearing. Some reports were submitted the day of the hearing, and a few reports were submitted to the court at the onset of the hearing. At the end of the practicum, a majority of the court reports

were turned in on time. All late reports were submitted within 15 days of the court hearing.

All cases were audited by the supervisor before they were allowed to be closed or transferred to another caseworker. At the beginning of the project, the "Case Summary/Transfer" form and the CWS 4 form (both required forms) were not included in the cases. At the end of the practicum, these forms were completed and included with all cases. This would be a 100% increase in organization.

Lastly, cases which involved children in placement were audited by a foster care reviewer from the state department. The purpose of the audit was to determine that all appropriate forms were completed, the children were in the most appropriate facility, and the caseworkers were providing adequate services to the clients. The caseworkers were advised of the audit approximately 20 days in advance. This gave them the opportunity to prepare their cases. Generally, the auditor found a few problems with the cases. During the course of the practicum the auditor found no errors reported for the month of September. However, in October, the auditor did find the usual amount of errors. These errors primarily concerned incomplete or missing paper work.

The fourth objective was to increase the quality of client services from the caseworkers 100 percent by the end of the twelfth week. Attainment was measured through the evaluation of a questionnaire designed to compare the percentages of time spent by each caseworker for each specific task. The tasks were rated based on the caseworker's opinion of the actual percentage of time spent for each task, the idealistic percentages of time spent for each task, and the realistic percentages of time spent for each task. Measurement consisted of the differences between the initial, half-way, and completion responses. What was measured was the percentage changes which occurred in the responses to the questionnaire (see Appendix B) over the process of the study. The first graph, (see figure 1) indicated the percentages given by the caseworkers for the primary work categories with respect to the "actual" amount of time they spent on each category. The categories were: 1) court, 2) case planning, 3)

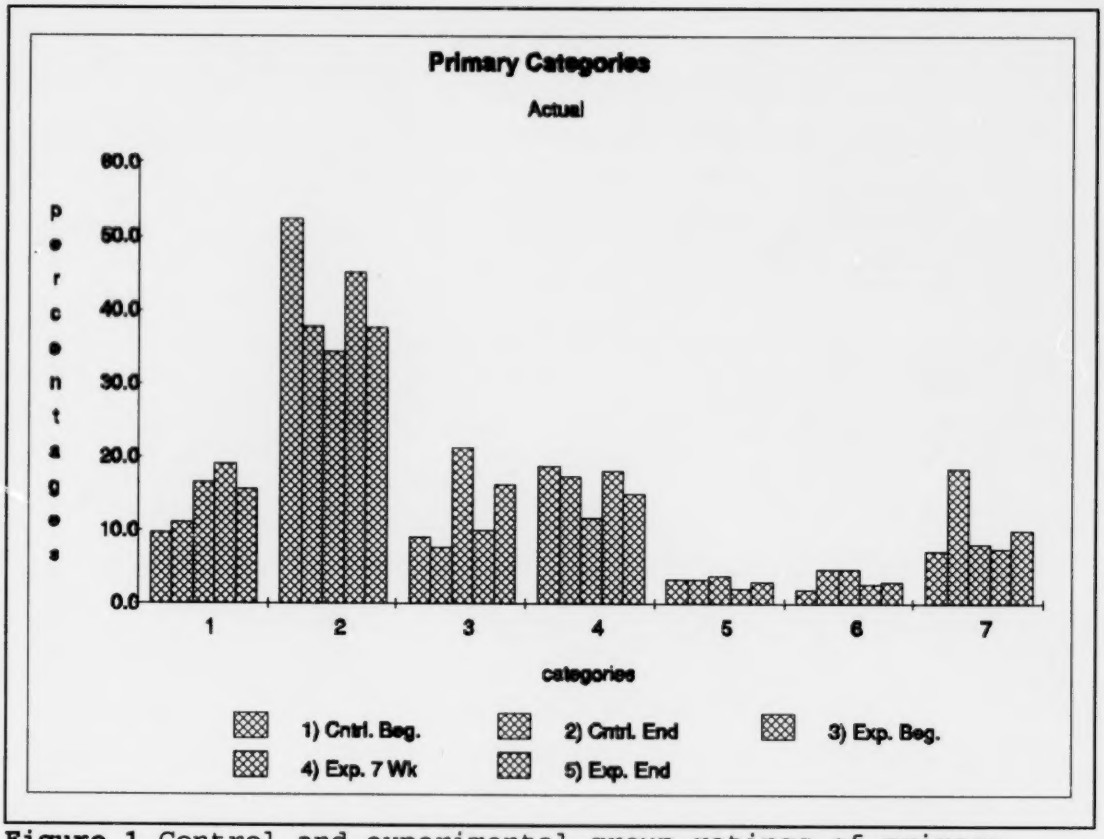

Figure 1 Control and experimental group ratings of primary categories with respect to actual time spent on each.

travel, 4) meetings, 5) inservices training, 6) daily planning, and 7) unscheduled events & crisis intervention. The graph indicated the areas of case planning (2), meetings (4), and unscheduled events and crisis intervention (7), increased somewhat with the remaining areas decreasing.

The second graph (see figure 2) indicated the percentages given by the caseworkers for the primary work categories with respect to the "ideal" amount of time they spent on each category. The categories remained the same as in the first graph.

The graph indicated the caseworkers expressing an ideal increase in the areas of case planning (2), meetings (4), inservice training (5), and a decrease in the areas of court (1), travel (3), daily planning (6), and

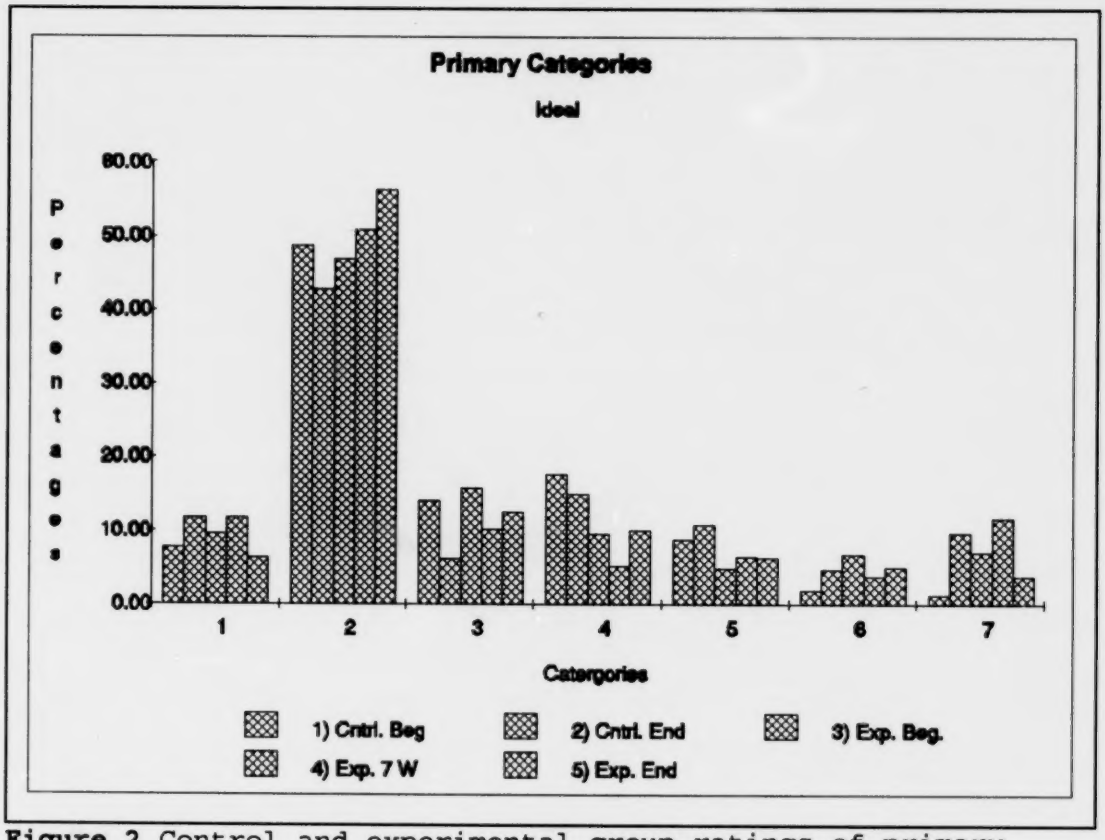

Figure 2 Control and experimental group ratings of primary categories with respect to the ideal time spent on each.

unscheduled events and crisis intervention (7). In considering both graphs the caseworkers indicated a discrepancy with the categories of inservice training (5) and unscheduled events and crisis intervention (7). With respect to the category of meetings (4), the "actual" time decreased slightly and the "ideal" time increased slightly. With respect to unscheduled events and crisis intervention (7), the "actual" time increased while the "ideal" time decreased.

The third graph (see figure 3) indicated the percentages given by the caseworkers for the primary work categories with respect to the "Realistic" amount of time they spent on each category. The categories remained the same as in the other two graphs.

The third graph showed increases in the areas of court (1), case planning

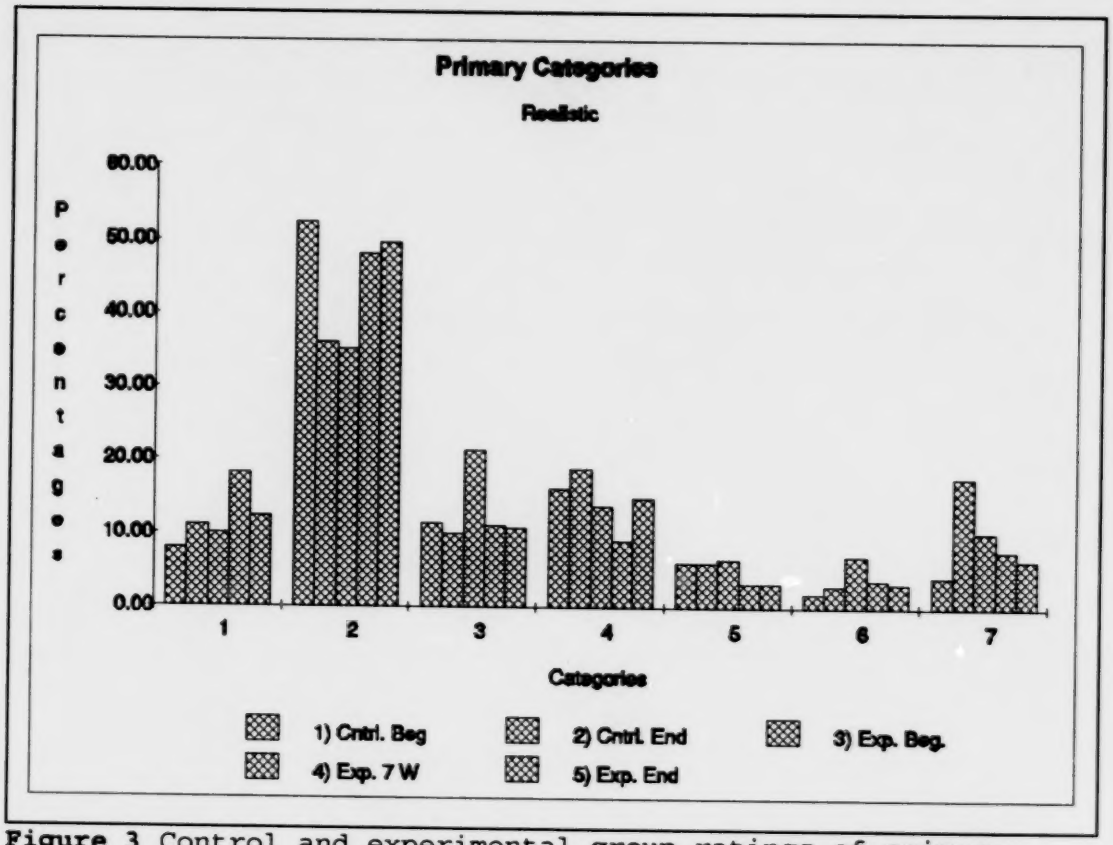

Figure 3 Control and experimental group ratings of primary categories with respect to the realistic time spent on each.

(2), meetings (4), and decreases in the remaining areas. With comparison to the first graph (actual time), the two graphs showed time increases in the areas of case planning (2) and meetings (4). The same two graphs showed contrast in the areas of court (1) and unscheduled events and crisis intervention (7). With respect to court, the "actual" time decreased slightly while the "realistic" time increased. With respect to unscheduled events and crisis intervention, the "actual" time increased while the "realistic" time decreased.

When comparing all three graphs, the caseworkers showed increases of overall time in the areas of case planning (2) and meetings (4). They showed decreases in the areas of travel (3) and planning (6). Since case planning and meetings both concentrate on case services, the graphs would indicate that the services to clients did increase. For the actual figures, see appendix F and G.

The fifth objective was to reduce staff overtime by 100 percent by the end of the twelfth week. Attainment would be measured through the evaluation of actual time sheet forms and a questionnaire designed to solicit the opinions of the caseworkers before implementation and after the exercise.

The caseworkers decreased their overtime slightly. Keeping track of the overtime through monitoring the caseworkers time sheets became useless, because some of them stopped recording their overtime hours. However, the survey (see appendix A) indicated a slight decrease in overtime worked during the work week. The survey originally indicated the workers were working 3.9 to 4.9 hours of overtime per week. The final survey indicated this to be reduced to 3 hours per week. On the other hand, the original survey indicated the caseworkers were working 5.3 hours per month on their days off. The final survey showed a slight increase of overtime to 5.5 hours per month.

The sixth outcome was to increase the caseworkers' concept of their ability to perform their jobs by 50 percent by the end of the twelfth week. Attainment was measured through a questionnaire designed to solicit the opinions of the caseworkers before and after the exercise. The differences between the responses were used to determine whether the staff believed the exercise was successful.

The questionnaire (see appendix A) originally indicated the caseworkers felt to have only 47.5 percent control over their ability to perform their jobs. The final survey indicated the caseworkers to have increased their feelings of control to about 60.2 percent. In response to question number five (How much control do you believe you have over your ability to perform your job?), one caseworker wrote: "A great deal of control - that's one of the plus points of this job". All but one of the caseworkers indicated they were on target with their caseloads. All of the caseworkers indicated they kept a daily planner. While the author had observed that they did not schedule all events into their planner, they had been able to increase their job performances. Finally, all of the caseworkers indicated they set goals for themselves. However, two of them indicated they were not always successful at completing them.

Chapter 5

Conclusion and Recommendations

The problem examined for this practicum dealt with the lack of an established strategy or planning method used by the caseworkers for accomplishing their job requirements. To accomplish all that was required for proper casework procedures, an organizing and planning tool needed to be developed. The tool needed enough flexibility to meet the different requirements and characteristics of each caseworker.

The solution strategy was to provide the staff with a planning system based on each caseworker's needs. The goal was to increase their organization, increase the quality of services provided to the clients and reduce overtime.

The primary outcomes to be accomplished were: 1) To introduce the planning system to the caseworkers during the first two weeks, and to create ownership and a desire to participate. The outcome was successful. The planning system was introduced and all of the caseworkers stated a desire to participate.

The second objective was to establish each caseworker's planning strategy by the end of the second week. Planning strategies were developed for each caseworker. The intent was to allow each caseworker to utilize the planning system, as established in appendix C, in a way that would work best with their particular job responsibilities. However, there were a few who never fully implemented the strategies, or so it would appear.

Kolb (1981) developed a Learning-style inventory. The inventory discussed four types of learning styles: converger, diverger, assimilator, and accommodator. Each of these styles also represented a way of doing things. For example, the converger was identified as a person who used ideas and theories while the accommodator was a person who enjoyed carrying out plans and new challenging experiences. Perhaps those caseworkers who had different learning styles than those of the author used the planning system differently, but

effectively, from how the author anticipated they would use them.

The third outcome was to increase the caseworker's organization 100 percent through the use of the planning system. The measurement for this outcome was the completion of paperwork. The author was unable to determine whether there was an increase of 100 percent. However, the results of ticklers and audits did demonstrate a positive reduction in the areas of incomplete paperwork and an increase in completing the paperwork on time. This result could not be attributed to the planning system or to the ticklers supplied by the state.

The fourth outcome was to increase the quality of client services from the caseworkers 100 percent by the end of the twelfth week. The graphs indicated there were increases for the areas of case planning and meetings. The increases were not 100 percent greater than the beginning measurements. The caseworkers were instructed to fill out the survey, from appendix B, so that the sum of all seven primary areas would equal 100 percent. Therefore, if there was an increase in one primary category, another primary category would have to be decreased. Further more, an increase in a particular primary category would not necessarily indicate that the quality or quantity of work had increased. In order to measure quality or quantity, a different tool would need to be developed.

Examination of the graphs would also indicate that the relationships between actual, ideal and realistic times changed each time the caseworkers completed the survey. This would indicate that these were not fixed relationships for the caseworkers. It would also indicate that the workers would never be able to attain an ideal state.

The fifth objective was to reduce staff overtime by 100 percent by the end of the twelfth week. This objective was not successfully achieved. The overall amount of overtime remained relatively consistent throughout the duration of the practicum. However, as one caseworker pointed out, overtime was a normal expectation for caseworkers and therefore, considered to be part of their normal working hours. Lastly, it should be pointed out that while caseworker

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performance increased, the amount of overtime did not increase respectively. This would give some credence to better organization.

The sixth outcome was to increase the caseworkers' concepts of their ability to perform their jobs by 50 percent by the end of the twelfth week. The overall responses by the caseworkers indicated there was a definite increase concerning their control over their ability to perform their jobs.

The information gathered from the practicum indicated there was a positive change in work performance and caseworker effectiveness. It was not possible to directly correlate the observed change to the planning system. However, there were some indirect indications that the caseworkers organization skills had increased. For example, because the job performance increased without an increase in overtime, it would indicate that the workers had increased their organization skills. With respect to the quality of services provided to the clients, the Foster Care Reviews showed a definite improvement due to no errors during the month of September. This thorough review examined whether the client personally obtained the required quality services from the caseworkers. During this practicum period, there were no negative comments in this area.

Part of the purpose of having the caseworkers rate their time based on what they thought would be "Ideal" and "Realistic" was to be able to determine whether they were able to obtain these levels during the course of the practicum. However, the caseworkers' concept of ideal changed with each measurement. Recommendations for this problem are to establish a fixed measurement of "Ideal" and "Realistic" at the beginning of the exercise. Then progress could be measured against the initial measurements. It would also be helpful to provide a base definition of what "Ideal" and "Realistic" mean to the caseworkers so that their answers would be based on one consistent idea.

Another factor contemplated was related to the learning styles of the caseworkers. Consideration was directed toward how each caseworker's learning style directed their skills for performance. Perhaps the format of the planning system was not conducive to the learning style of the caseworker, or

the caseworker's learning styles directed her/him to use the planning system differently than was expected.

The author's supervisor pointed out that one factor to consider which could account for the positive changes observed during the project concerns the focus directed toward increasing job performance. Because the caseworkers were allowed to adapt the planning system to meet their needs, it could be quite possible that the caseworkers interpreted the object of the practicum as being the improvement of job performance rather than the improvement of job performance through the use of a planning system.

Another factor effecting the outcome of the project deals with the variables present. In a functioning casework unit, there are too many extraneous events occurring to be able to accurately measure the effect of one factor. As previously discussed, some of the factors involved with this project were the development of a new court tickler, the transfer of a caseworker to another unit, and the introduction of a new program by the state department.

The last factor to consider, also discussed with the author's supervisor, concerned the timing of the practicum in conjunction with the newness of the author to the supervisory position. The author was newly placed in the position of supervisor of the unit, from outside the organization, five months prior to the onset of the practicum. As a result, the author was still in the process of learning the job requirements and establishing rapport with the caseworkers. If the supervisor had been well established within the organization, the results may have been different.

Overall, with the exception of there being no change in the amount of overtime, there was a definite improvement in job performance by the caseworkers. There was strong evidence that the organization of the caseworkers had improved and the quality of service to the clients had improved. However, it could not be directly concluded that the planning system was responsible for the results achieved. There were several external influences which could have accounted for the improvements. These influences

included ticklers from the state department indicating paperwork needs, a tickler developed during the process of the practicum to enhance the submittance of court reports, and the audits conducted by the Foster Care Review worker. However, with the exception of the court tickler, these influences did exist prior to the onset of the practicum. Therefore, the existence of these systems could be considered as part of the status quo. In other words, they existed when the problem was detected. Because the planning system was not part of the status quo and there was observable improvement during the course of the practicum, one could conclude that it did create an effect on the overall performance of the caseworkers. The problem still remains as to what extent the planning system influenced these changes.

There were three primary implications that arose from this study. The first was that focusing on job performance with the workers can have a positive effect. The method used may or may not be relevant. Secondly, the learning styles of the workers should be considered to determine how they could change their performance. To combine the two aspects would generate the best possibilities for performance change. Lastly, the caseworkers concept of "idealness" continually changed. Since it was not a fixed concept, the caseworkers could never attain it. Fixing the concept of "idealness" would allow for a firmer target goal, for a reference point for progress, and a method to provide feedback to the caseworker.

Recommendations for trying this approach: First, the supervisor should be well established in her/his position and have a good working relationship with the workers. This would include understanding the learning style of each worker. Second, it would be best to focus on one aspect of the job performance such as increasing quality of client services. This would enable the supervisor to better evaluate the success or needed adaptations to the system. Last, the caseworker's concept of "idealness" should be fixed or established at the beginning of the process. This would provide a definitive point for goal attainment.

It is the intention of the author to use the planning system as part of

the training of new workers. As each aspect of the job is introduced, the new worker would learn how to incorporate it into her/his planning system. Perhaps, when the system can demonstrate its effectiveness, it can be shared with other individuals in the child protection profession.

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APPENDIX A

QUESTION FORM

Please answer the following questions.

1. Do you keep a daily planner?
2. On average, approximately how many hours of overtime do you work weekly? How many hours of overtime have you worked during the past week?
3. On average, how much do you work on your days off during an average month (number of hours or days). How much have you worked on your days off during the past month?
4. With your current caseload, are your current responsibilities behind, on target, or ahead of your expectations?
5. How much control do you believe you have over your ability to perform your job?
6. Concerning the portion of your job for which you have no control, how much is responsible from:
   - the client's needs?
   - the agency's needs?
   - other agencies needs?
7. Do you practice a goal setting and completion routine?

Appendix B

JOB RESPONSIBILITIES FOR CASEWORKERS

In the table below is a list of job responsibilities. The first column contains the list of responsibilities. These are categorized by major groups and subdivided by responsibilities within each group. In the second column, please give a percentage rating of how much time you spend weekly on each major responsibility. Then provide a percentage for each subcategory as it relates to the major category. In the third column, please give a percentage rating of how much time you believe should be ideally spent on each responsibility. In the last column, please give a percentage rating of how much time you believe would be realistic for each responsibility.

JOB RESPONSIBILITIES for CASEWORKERS			
Responsibility	Actual time spent	Ideal time spent	Realistic time spent
1. Court:			
Report preparation			
Hearings			
Attorney contacts			
Other phone contacts			
2. Case planning:			
Face to face contacts			
Locating placements			
Locating services			
Completing forms			
Case investigation			
Case documentation			
Phone contacts			
3. Travel:			
Placement visits			
School visits			
Home visits			
Other travel			
4. Meetings:			
Supervisory meetings			
Unit meetings			
Other meetings			
5. Inservices training			
6. Daily planning			
7. Unscheduled events & Crisis intervention			

Appendix C

GENERAL WORK SCHEDULE

GENERAL WORK SCHEDULE					
TIME	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
8:00 AM					
8:30 AM					
9:00 AM					
9:30 AM					
10:00 AM					
10:30 AM					
11:00 AM					
11:30 AM					
NOON					
12:30 PM					
1:00 PM					
1:30 PM					
2:00 PM					
2:30 PM					
3:00 PM					
3:30 PM					
4:00 PM					

NOTES: _____

Appendix D

DAILY PLANNING FORM

1,2,3...PRIORITY *.....HOLD TASK ‡.....DELAY TASK ✓.....TASK DONE		TIME	MONTH_____DAY_____ DATE_____YEAR_____ APPOINTMENTS	CONTACT/RETURN
TODAY'S GOALS		7:30		
		8:00		
		8:30		
		9:00		
		9:30		
		10:00		
MUST DO		10:30		
		11:00		
		11:30		
		NOON		
		12:30		
		1:00		
NEED TO DO		1:30		
		2:00		
		2:30		
		3:00		
		3:30		
		4:00		
		4:30		

Appendix E

IMPLEMENTATION PLANS

The first event will be to distribute two evaluation tools to the caseworkers (Appendix A and B) before the beginning of the practicum. These tools will be used to measure the resulting responses of the caseworkers to the planning system. The first tool is a questionnaire designed to solicit the opinions of the caseworkers before and after the exercise. The differences between the responses are used to determine whether the staff believes the exercise was successful. The second tool is a questionnaire designed to compare the percentages of time spent by each caseworker for each specific task. The tasks will be rated, based on the caseworker's opinion, on the actual percentage of time spent for each task, the idealistic percentages of time spent for each task, and the realistic percentages of time spent for each task. Measurement will consist of the differences between the initial, half-way, and completion responses. What will be measured are the percentage changes which occur in the responses to the questionnaire over the process of the study.

During the first two weeks of the project, the staff will be introduced to the planning system. The introduction will be conducted during a regular staff meeting. The advantages of the planning system (staff will be allowed to provide input into their own planning techniques to meet their specific needs), and instructions for its use (incorporate relevant work theories to enhance the planning process) will be discussed to create ownership and the desire to participate. Specific topics to discuss are: better organization, meeting departmental job requirements, increased quality of services to clients, and decreased overtime. Motivation techniques previously mentioned will be presented. For example, Keller's (1990) suggestion of play therapy (involves activity) will be incorporated by providing schedules for the caseworkers to manipulate during the discussion. Another activity is the use of brainstorming (Kerwin 1983). This technique will enable the caseworkers to consider the planning system from a positive aspect. After the initial staff meeting, the author will meet with each caseworker to answer any questions and assist with the implementation of the planning system.

During the next five weeks, the caseworkers will increase their

organization skills while learning how to use the planning system to their benefit. The author will discuss with each caseworker: establishing a daily 30 minute planning time for planning daily, weekly and monthly events, how to develop plans that include required priorities as established by job description and as established by their own needs, how to catch up with any work which is behind, how to plan for unexpected interruptions or events, a planning approach for prioritizing events, a method for keeping the developed plans, and individual progress and setbacks. At the end of this five weeks (the seventh week) the evaluation tool will be administered to the staff.

During the remaining five weeks, the caseworkers will increase the quality of services provided to clients. The author will discuss with each caseworker: how to increase the quality of services to clients based on an individual planning system, individual progress and setbacks, how to plan for all events during their work hours, how to make up for those situations which interrupted their established schedule, and how to establish some empty time during the day or week to be used for make-up work unfinished due to unscheduled interruptions.

After the last week has been completed, the evaluation tools will again be distributed to the caseworkers to determine the effects (positive and negative) of the planning system. The author will discuss, with each staff person, the results of the planning process. The author will discuss with his administrator whether there was a difference with the staff performance.

Appendix F

CONTROL GROUP SCORES

Control Group Scores				
Category	Chart	Beg %	End %	Differences
Court	Actual	9.7	11	1.3
Court	Ideal	7.7	11.7	4.0
Court	Realistic	8	11	3.0
Case Planning	Actual	52.3	37.7	-14.6
Case Planning	Ideal	48.7	42.67	-6.0
Case Planning	Realistic	52.3	36	-16.3
Travel	Actual	9	7.7	-1.3
Travel	Ideal	14	6	-8.0
Travel	Realistic	11.3	10	-1.3
Meetings	Actual	18.7	17.3	-1.4
Meetings	Ideal	17.7	15	-2.7
Meetings	Realistic	16	18.7	2.7
Inservices	Actual	3.3	3.3	0.0
Inservices	Ideal	8.7	10.7	2.0
Inservices	Realistic	6	6	0.0
Daily Planning	Actual	1.8	4.7	2.9
Daily Planning	Ideal	1.8	4.7	2.9
Daily Planning	Realistic	1.8	3	1.2
Unscheduled events	Actual	7.2	18.3	11.1
Unscheduled events	Ideal	1.2	9.7	8.5
Unscheduled events	Realistic	4.2	17.7	13.5

Appendix G

EXPERIMENTAL GROUP SCORES

Experimental Group Scores				
Category	Chart	Beg %	End %	Differences
Court	Actual	16.5	15.5	-1.0
Court	Ideal	9.5	6.3	-3.2
Court	Realistic	10	12.3	2.3
Case Planning	Actual	34.3	37.5	3.2
Case Planning	Ideal	46.8	56.3	9.5
Case Planning	Realistic	35	49.5	14.5
Travel	Actual	21.3	16.3	-5.0
Travel	Ideal	15.8	12.5	-3.3
Travel	Realistic	21.3	10.8	-10.5
Meetings	Actual	11.8	15	3.2
Meetings	Ideal	9.5	10	0.5
Meetings	Realistic	13.8	14.8	1.0
Inservices	Actual	3.8	3	-0.8
Inservices	Ideal	4.8	6.3	1.5
Inservices	Realistic	6.5	3.3	-3.2
Daily Planning	Actual	4.6	3	-1.6
Daily Planning	Ideal	6.8	5	-1.8
Daily Planning	Realistic	7	3.3	-3.7
Unscheduled events	Actual	8.1	10	1.9
Unscheduled events	Ideal	7	3.75	-3.3
Unscheduled events	Realistic	10.3	6.5	-3.8